



# *Client Segmentation Profile*

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Your Company Name:

This document is for internal use by advisers only.

## **A Clients**

Target annual renewal income:

Minimum investment assets:

Minimum Earnings:

Notes:

## **B Clients**

Target annual renewal income:

Minimum investment assets:

Minimum Earnings:

Notes:

## **C Clients**

Target annual renewal income:

Minimum investment assets:

Minimum Earnings:

Notes: